

North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal

Recipient Point of Care User Guide

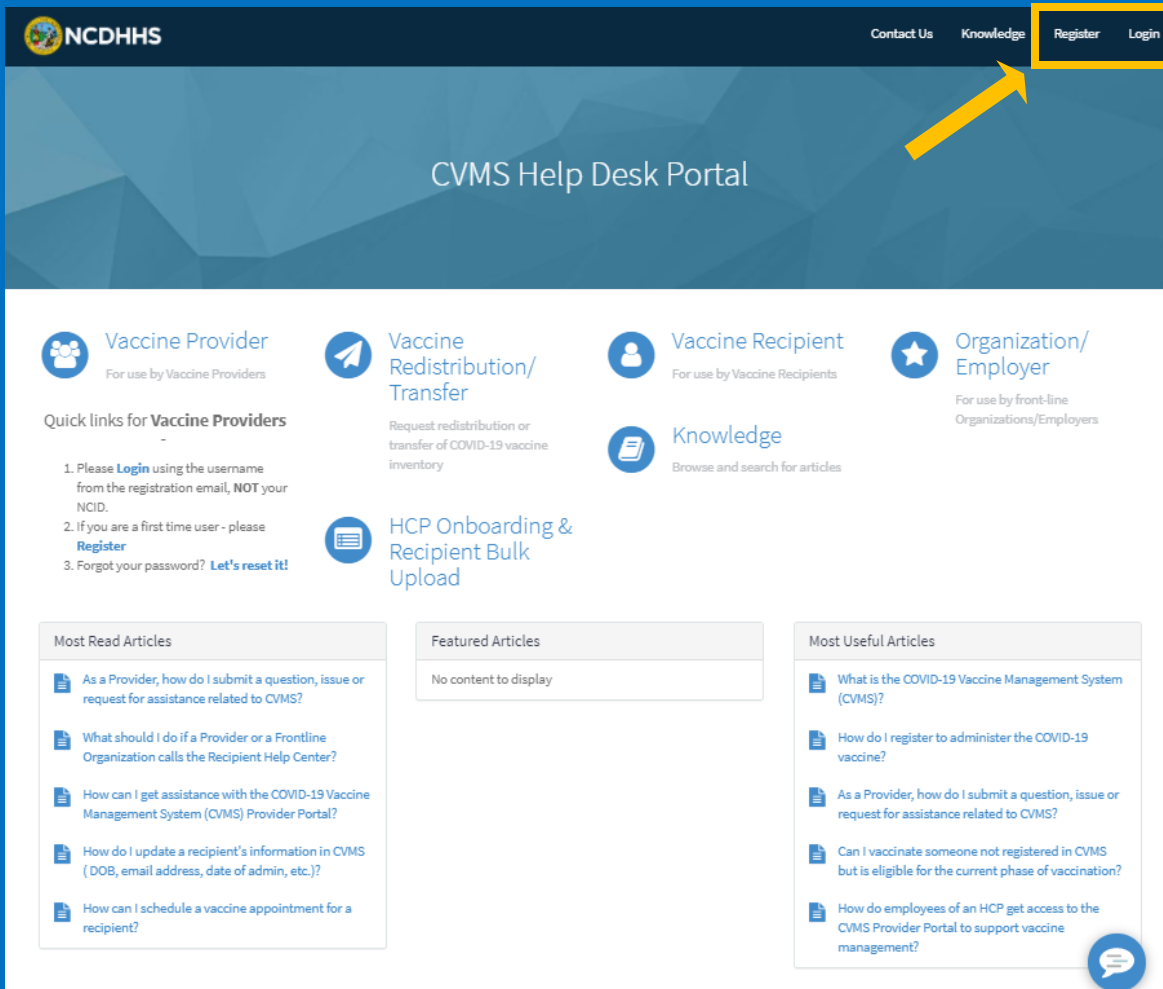
Version 12

June 30, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at

https://ncgov.servicenowservices.com/csm_vaccine

You can also call the COVID-19 Vaccine Provider Help Center at **(877) 873-6247** and select option 1.

The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday to Friday: 7 am – 7 pm ET

Saturday & Sunday: 10 am – 6 pm ET

* On the home page of the CVMS Help Desk Portal, select Login at the top right-hand corner, then select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, and business e-mail
3. You will receive an e-mail with your username and temporary password to log into the portal

Table of Contents

	Pages
Overview	4 – 6
Booking Walk-in Appointments	6 – 33
Standard Point Of Care Walk-In Appointment: Recipient is Registered in COVID-19 Vaccine Portal	8 – 13
Exception 1: Recipient Record is Not Yet Created in CVMS	14 – 24
Exception 2: Recipient Record is Created in CVMS, but Recipient Did Not Complete Registration	25 – 33
Other Operations on Recipient Records at Point of Care	34 – 58
Editing Recipient Registration Record Details	35 – 39
Looking Up A Recipient Who Received First Dose at a Long-Term Care Facility or Federal Partnering Pharmacy	40 – 45
Cancelling an Existing Appointment	46 – 52
Marking a Recipient as Deceased	53 – 58
Appendix	59 – 61

Overview

Overview

The screenshot shows the NCDHHS CVMS Provider Portal. At the top is a navigation bar with links: Home, Recipient, Appointments, Slot Management, and Help & Information. Below the navigation bar, a message states 'You are currently logged in as Clinic Location1' with a 'Switch Locations' button. The main content area is divided into two sections. The 'Recipient Check-In' section on the left contains a form for entering an 'Appointment Confirmation Number' with a 'Go' button, and a 'Search Appointments' button below it. The 'Appointment Walk-In' section on the right contains a form for searching by 'Name', 'Date Of Birth' (YYYY-MM-DD), and 'Email', with a 'Search' button. Below the search forms is a 'Search Results' table. The table has columns for Name, DOB, Email, and Vaccine. One result is shown: 'Space t Test', '1997-03-17', 'rohiniuat@mailinator.com', and 'Group'. At the bottom of the page, a footer message says 'Please be sure to bookmark this site: https://uat-ncdhhs.cs33.force.com/VaccineProvider'.

NCDHHS
CVMS Provider Portal

Home Recipient Appointments Slot Management Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

No Appointment Confirmation Number?

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth YYYY-MM-DD

Email

Search Results

Name	DOB	Email	Vaccine
Space t Test	1997-03-17	rohiniuat@mailinator.com	Group

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

The Recipient Point of Care process typically involves:

1. Verifying the recipient's identity
2. Creating an Appointment Booking for the recipient via the Appointment Walk-In Tool
3. Creating a Recipient Record on behalf of a recipient
4. Completing a COVID-19 Vaccine Registration on behalf of a recipient

It is important to note that to document a recipient Vaccine Administration in CVMS, the recipient **MUST BE** registered in CVMS. Registered in CVMS means the Recipient Record is found in CVMS, and the **COVID-19 Vaccine Registration** form is complete.

This set of activities can be performed by a user with a **HEALTHCARE PROVIDER, HEALTHCARE LOCATION MANAGER, or STATEWIDE LOCATION MANAGER** profile.

If your location enabled the scheduling feature in CVMS, please also check the Addendum for Scheduling Feature at Point of Care and Vaccine Administration at <https://covid19.ncdhhs.gov/media/2379/download>

You will also need to:

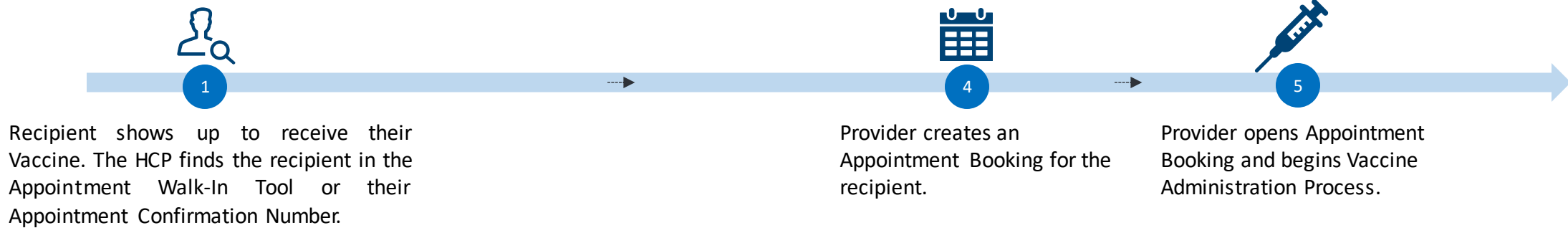
- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> using your NCID username and password.

Now, let's get started!

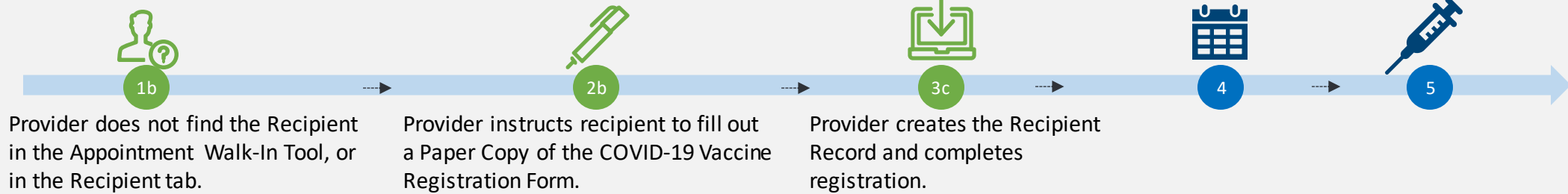
Booking Walk-in Appointments

Appointment Walk-In Booking Process

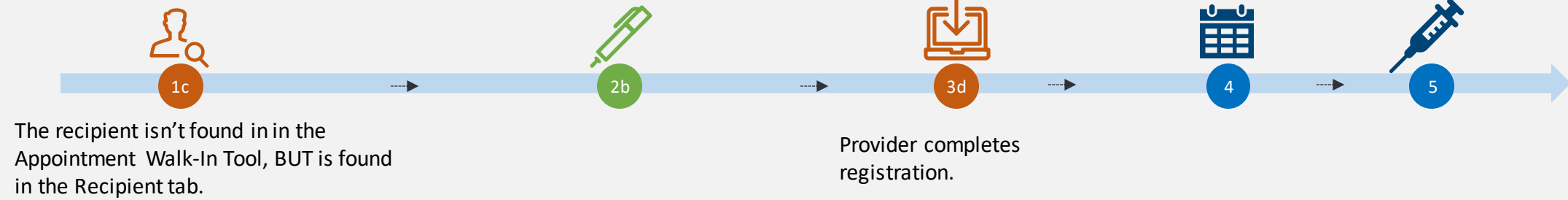
Standard Appointment Walk-in Booking – Recipient Already Registered on COVID-19 Vaccine Portal



Exception 1 – What if the Recipient Record is not yet Created?



Exception 2 – What if the Recipient Record is Created, but Recipient did not Complete Registration?



Standard Point of Care Walk-in Appointment: Recipient is Registered in COVID-19 Vaccine Portal

Step 1 of 5: Navigate to the CVMS Provider Portal Home Page

From the **HOME PAGE**, you will complete a simple **SEARCH** using the **APPOINTMENT WALK-IN TOOL** on your home page before the recipient receives the COVID-19 vaccine.

Note: If you do not have the scheduling feature in CVMS enabled, you will not see the **RECIPIENT CHECK-IN** tool on the Home Tab. For more information, refer to the **ADDENDUM FOR SCHEDULING FEATURE AT POINT OF CARE AND VACCINE ADMINISTRATION USER GUIDE**.

HomeRecipientAppointmentsHelp & Information

You are currently logged in as Clinic Org1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Apr 12, 21, 07:00 PM	Carla Newman Dose 2 Scheduled	03147476	Clinic Org1
Apr 12, 21, 09:44 AM	Walk-inNa walk Walk-inLna Dose 1 Scheduled	03499052	Clinic Org1
Apr 12, 21, 09:00 AM	TTest test test Dose 1 Scheduled	03498435	Clinic Org1
Apr 12, 21, 08:00 AM	PerfTestMar2101 PerfTestMar2101 Dose 1 Scheduled	03498867	Clinic Org1
Apr 12, 21, 08:00 AM	PerfTestMar2101 PerfTestMar2101 Dose 1 Scheduled	03498473	Clinic Org1

View all

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

YYYY-MM-DD

Email

Search

Audience

**Healthcare
Provider**

Healthcare Location Manager

Statewide Location Manager Profile

Tips

If you have access to **multiple locations in CVMS**, be sure to look at the location you are operating in by looking at the **top left of the screen under the Tabs bar**.

If you need to change the location to match where you are operating for the day, select the **SWITCH LOCATIONS** button and choose the applicable location.



Step 2 of 5: Search for the Recipient

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Walkin Example

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

To get started, you will search for the **RECIPIENT** to help you **VERIFY IDENTITY** before creating their appointment.

- 1. Enter the recipient’s **NAME, DATE OF BIRTH** and / or **EMAIL ADDRESS** in the Appointment Walk-in Tool located on the Home Page
- 2. Only one field is required to search
- 3. Click **SEARCH**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

To narrow your recipient search results, you can enter all search fields to help you find the recipient faster.

Note: To document a recipient Vaccine Administration in CVMS, the recipient **MUST BE** registered in CVMS. Registered in CVMS means the Recipient Record is created, and the COVID-19 Registration Form is complete.

Step 3 of 5: Review Recipient's Information

After clicking search, you will see your **RECIPIENT SEARCH RESULTS** populate underneath the Appointment Walk-In Tool. You will be able to view the Recipient's **NAME, DATE OF BIRTH (DOB), EMAIL, VACCINE PRODUCT NAME (if they have already received a dose), VACCINE DOSE STATUS, and DATE OF ADMINISTRATION (if they have already received a dose).**

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Walkin Example

Date Of Birth

YYYY-MM-DD

1965-12-12

Email

Search Email

Search

Search Results

1 records found

Appointment Booking

Name	DOB	Email	Vaccine Product Name	Vaccine Dose Status	Date of Administration
Walkin Example	1965-12-12	wexample@mailinator.com		Registered	

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

VACCINE DOSE STATUS indicates where a recipient is in their progress toward being vaccinated. Possible statuses include:

- REGISTERED
- DOSE 1 SCHEDULED
- DOSE 1 ADMINISTERED
- DOSE 2 SCHEDULED
- DOSE 2 ADMINISTERED
- DOSE 1 CANCELLED
- DOSE 2 CANCELLED

Step 4 of 5: Create the Appointment Booking

Once you verified the recipient’s identity, you can officially **CREATE THEIR APPOINTMENT BOOKING**.

- 1. In your **SEARCH RESULTS**, select the **CORRECT RECIPIENT RECORD**
- 2. Click **APPOINTMENT BOOKING**
- 3. A message confirming the appointment booking was created will appear
- 4. Click **OK**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Search Results

1 records found

Appointment Booking


Name	DOB	Email	Vaccine Product Name	Vaccine Dose Status	Date of Administration
<input checked="" type="radio"/> Walkin Example	1965-12-12	wexample@mailinator.com		Registered	

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Step 5 of 5: Review the Appointment Booking

The appointment that is created will be available to you under **TODAY'S APPOINTMENTS**.

To begin the **VACCINE ADMINISTRATION** process, the recipient will require an **APPOINTMENT BOOKING** or **APPOINTMENT CONFIRMATION NUMBER** (if scheduling feature in CVMS is enabled).



Home Recipient Appointments Help & Information

You are currently logged in as Clinic Org1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Apr 12, 21, 01:11 PM	Walkin Example Dose 1 Scheduled	03499186	Clinic Org1

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Note: To know more about the **VACCINE ADMINISTRATION** process, please reference the CVMS Provider Portal Vaccine Administration User Guide at [CVMS User Guides, Recorded Trainings and Upcoming Trainings / NC DHHS COVID-19](#).

Exception 1: Recipient Record is not yet Created in CVMS

Step 1 of 9: Navigate to the CVMS Provider Portal Home Page

- 1. From the **HOME PAGE**, enter the recipient's name in the **APPOINTMENT WALK-IN TOOL**
- 2. If the recipient's record does not appear, this means that the recipient is either not registered or does not have a record

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Fred NewRecipient

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

No search results found or User's Eligibility is not Approved.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1
Jan 19, 21, 03:01 PM	Walkin Example Dose 1 Scheduled	00111942	Clinic ABC Loc 1

Please be sure to bookmark this site: <https://uat3-ncdhhs.cs32.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile


Step 2 of 9: Search for the Recipient Record

To see if the recipient has a record, but is not yet registered, search for them in the **RECIPIENT** tab.

- 1. Navigate to the **RECIPIENT** tab
- 2. Enter the recipient's **NAME** (first name and last name) in the search bar
- 3. To help narrow results, enter the recipient's **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field

Note: The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself

- 4. Click **SEARCH**



Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Search

Recipients within CVMS

0 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient D...	Date of Adm...	Email	Inactive Rea...
------------	-------------	-----------	---------------	--------	----------------	----------------	----------------	-------	-----------------

Recipients from Long Term Care/Federal Pharmacy Programs

First Name	Last Name	Date of Birth	Gender	Dose Number	Vaccine Manufacture...	Vaccination Administrati...
------------	-----------	---------------	--------	-------------	------------------------	-----------------------------

No results, please search again.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

Enter at least three characters to receive results.


A Vaccine Administration cannot be documented in CVMS if the recipient is not registered in CVMS.

Registration is complete when a recipient's answers to the **COVID-19 Vaccine Registration** form are entered into CVMS. This can occur in the **COVID-19 VACCINE PORTAL** or the **CVMS PROVIDER PORTAL**.

Step 3 of 9: Search for the recipient Record

After clicking search, the **RECIPIENT SEARCH RESULTS** will populate in either the **RECIPIENTS WITHIN CVMS** section, or the **RECIPIENTS FROM LONG TERM CARE/FEDERAL PHARMACY PROGRAMS** section

If there are **NO** results in the **RECIPIENTS WITHIN CVMS** section, or the **CORRECT** recipient cannot be found, this indicates that the recipient does not have a record in CVMS, and must be created on-site



HomeRecipientAppointmentsHelp & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Full name, ex: John Smith

Email, John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

0 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient D...	Date of Adm...	Email	Inactive Rea...
------------	-------------	-----------	---------------	--------	----------------	----------------	----------------	-------	-----------------

Recipients from Long Term Care/Federal Pharmacy Programs

First Name	Last Name	Date of Birth	Gender	Dose Number	Vaccine Manufacture...	Vaccination Administrati...
------------	-----------	---------------	--------	-------------	------------------------	-----------------------------

No results, please search again.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

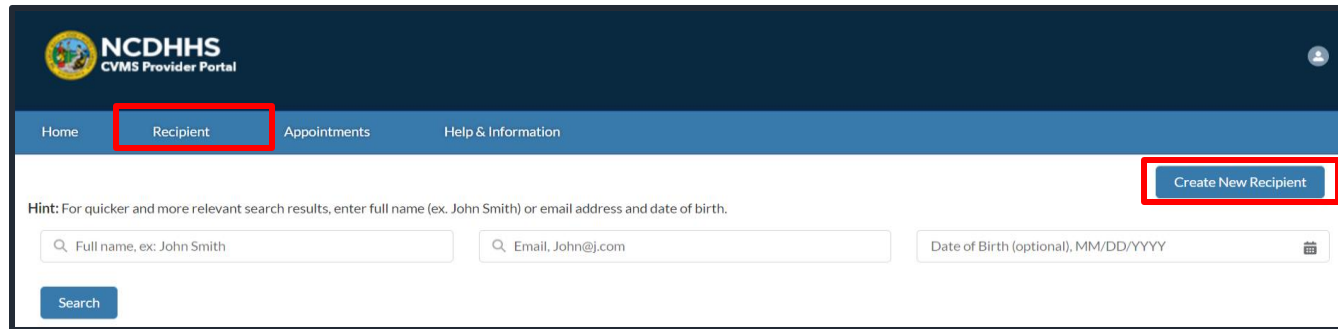
Tips

For more information on how to handle recipient search results that appear in the **RECIPIENTS FROM LONG TERM CARE/ FEDERAL PHARMACY PROGRAMS** section, please see the **WHAT IF THE RECIPIENT RECEIVED THEIR FIRST DOSE THROUGH A LONG-TERM CARE FACILITY/FEDERAL PHARMACY** portion of this User Guide.

Step 4 of 9: Ask the recipient to answer the COVID-19 Vaccine Registration Form

OPTION 1 – Register the recipient by filling out the COVID-19 Vaccine Registration form with the recipient

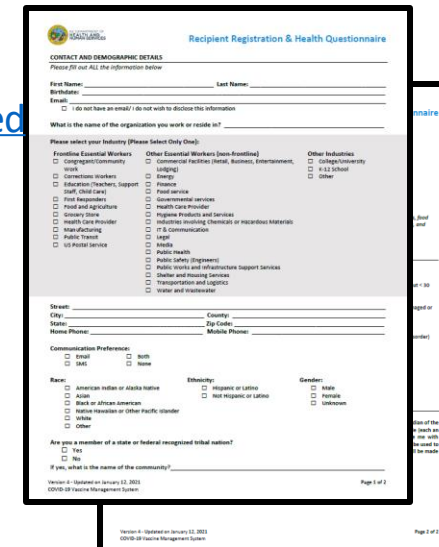
1. Click the **CREATE NEW RECIPIENT** button on the **RECIPIENT** tab to bring up a pop-up form, read the questions and type the recipient's answers



The screenshot shows the NCDHHS CVMS Provider Portal. The 'Recipient' tab is highlighted with a red box. Below the navigation bar, there is a search bar with a hint: 'Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.' The 'Create New Recipient' button is highlighted with a red box.

OPTION 2 – Ask the recipient to answer the questions on a Paper Copy

1. Instruct the recipient to fill out a paper copy of the COVID-19 Vaccine Registration form (the PDF file is available under the **HELP & INFORMATION TAB** or on the NC Immunization Branch website at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#) labeled as **RECIPIENT REGISTRATION AND COVID-19 VACCINE ADMINISTRATION FORM** (in English and Spanish))
2. Give the recipient a few minutes to fill the form
3. Click the **CREATE NEW RECIPIENT** button on the **RECIPIENT** tab to bring up a pop-up form



The screenshot shows the 'Recipient Registration & Health Questionnaire' form. It includes sections for 'CONTACT AND DEMOGRAPHIC DETAILS', 'Please select your industry (Please Select Only One)', 'Please select your ethnicity (Please Select Only One)', and 'Please select your gender (Please Select Only One)'. The form is titled 'Recipient Registration & Health Questionnaire' and includes a version number 'Version 4.0 - Updated on January 12, 2023'.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

Print several copies of the **COVID-19 Vaccine Registration form** to keep on hand to provide recipients.

Step 5 of 9: Create the Recipient Record

Create New Recipient

* First Name

Fred

Middle Name

* Last Name

NewRecipient

Email

frednewrecipient@mailinator.com

No Email Provided

☐

* Birthdate (MM/DD/YYYY)

Dec 12, 1944



Cancel

Create Recipient

Use the recipient's **COVID-19 Vaccine Registration paper form** to fill in required fields

1. If the recipient cannot provide an email address, select the **NO EMAIL PROVIDED** checkbox. Please inform the recipient that in the absence of an email address, it will not be possible for them to connect to the COVID-19 Vaccine Portal and view their digital Proof of Vaccination. You can however access this from the CVMS Provider Portal and print it for them if needed
2. Enter **BIRTHDATE**
3. Select **CREATE RECIPIENT**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

Reference section
Understanding How Recipient Vaccine Group is Determined
for more details on Vaccine Groups.

If the recipient is **retired** or **unemployed**, do not select an Employer, and select **OTHER** in **INDUSTRY** field.

Step 6 of 9: Begin the recipient's COVID-19 Vaccine Registration

Once the recipient is created, a new browser tab will open for you to fill out the recipient's **COVID-19 Vaccine Registration** form using the paper copy the recipient filled out.


- 1. Review the information statement
- 2. Click **NEXT**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile



[Home](#) [Recipient](#) [Appointments](#) [Help & Information](#)

Vaccine Registration for: Fred NewRecipient

Introduction

Contact and Demographic Detail

Confirmation

COVID-19 Vaccination Registration

Please complete the registration form for COVID-19 vaccination, which should take less than 5 minutes to complete.

Information about your COVID-19 vaccination is carefully managed to protect your privacy. Your immunization information will not be shared except in accordance with state and federal law. NC CVMS is a system that enables the collection of immunization information for health and safety reasons. The immunization information collected for NC CVMS is similar to the information that is required when you go to the doctor's office or a pharmacy for a vaccination, including your name, address, date of birth, location where vaccine was given, when the vaccine was given, person who administered the vaccine, information about the specific vaccine vial (expiration date, vaccine identifier number, etc.) and how the vaccine was given (e.g., in the muscle of the right arm). NC CVMS also collects information about race and ethnicity, which is necessary to support efforts for equitable vaccine distribution in NC. To meet federal requirements established by the U.S. Centers for Disease Control and Prevention (CDC) and in accordance with NC state law, NC does not submit any identifiable information to CDC. Instead of the CDC requested identifying information, NC is currently submitting the vaccine recipient's year of birth (not date of birth), the first 3 digits of the vaccine recipient's zip code of residence (if the underlying population in that zip code includes more than 20,000 people) and the date of submission of the vaccination record. More information about federal CDC data requirements is available at: <https://www.cdc.gov/vaccines/covid-19/reporting/requirements/index.html>

Next

Step 7 of 9: Enter the Recipient's Demographic Information and Vaccine Group

- 1. Enter the recipient's demographic information, contact information, language, and disability as entered by the recipient on **COVID-19 Vaccine Registration form**
- 2. Click **NEXT**

Vaccine Registration for: Fred NewRecipient

Introduction

Contact and Demographic Detail

Confirmation

Please provide the information below. Items with a * are required.

* First Name
Fred

Middle Name

* Last Name
NewRecipient

* Address Line 1

Address Line 2

* City

* County
--None--

* State
--None--

* Zip Code

Email (Will allow you to access your vaccine information in the COVID-19 Vaccine Portal.)
frednewrecipient@mailinator.com

Home Phone

Mobile Phone

* The best way to contact you
--None--

* Date of Birth (MM/DD/YYYY)
Dec 12, 1944

* Race
--None--

* Ethnicity
--None--

* Gender
--None--

Preferred Language
--None--

*Providing a Language preference will not provide translated text/communication, except Spanish.

Please check all disabilities that apply to you:

☒ Not Disabled

☐ Cancer

☐ Cognitive (Psychological or Psychiatric)

☐ Neurological

☐ Physical (Mobility)

☐ Respiratory

☐ Sensory (Vision or Hearing)

☐ Other (Please Specify)

Next

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

We strongly encourage recipients to provide a valid email address as it will give them access to the COVID-19 Vaccine Portal, from where they can download their Vaccine Information PDF.

If a recipient lives in an apartment or suite, use the optional **ADDRESS LINE 2** field.

Step 8 of 9: Submit the Recipient's Information

Review the information you entered from the paper copy of the **COVID-19 Vaccine Registration form**.

- 1. Validate that the information entered matches the information given by the recipient
- 2. To make changes, select **PREVIOUS**
- 3. If the information is correct, select **SUBMIT**

NCDHHS

CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

Vaccine Registration for: Fred NewRecipient

Introduction

Contact and Demographic Detail

Confirmation

Confirm and submit to enroll

Please review the information below and confirm that it is correct. Click submit to complete your registration.

Background Information

First Name

Fred

Middle Name

Last Name

NewRecipient

Address

123 Main Street

City

Raleigh

County

Wake

State

North Carolina

Zip Code

12345

Country

United States

Email

frednewrecipient@mailinator.com

Home Phone

Mobile Phone

The best way to contact you

None

Date of Birth (MM/DD/YYYY)

12/12/1944

Race

White

Ethnicity

Not Hispanic or Latino

Gender

Male

Preferred Language

English

Disability

Neurological | Respiratory | Sensory (Vision or Hearing)

Previous

Submit

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

If you have any questions about what a recipient wrote, ask them for clarification before submitting.

Step 9 of 9: Verify the Recipient's Registration

- 1. The **REGISTRATION IS COMPLETE**
- 2. The recipient's **RECIPIENT DOSE STATUS** is updated to **REGISTERED** and is visible on the Recipient tab

Home Recipient Appointments Help & Information

Vaccine Registration for: Fred NewRecipient

Introduction

Contact and Demographic Detail

Confirmation

Your registration is complete

Thank you for completing the registration process. Please remember that registration does not mean that you are currently eligible to be vaccinated or that you have an appointment. A free COVID-19 vaccine will be available to all who want it, but supplies are currently limited. Get accurate information about COVID-19 vaccines at [YourSpotYourShot.NC.Gov](#).

Home Recipient Appointments Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Q Fred NewRecipient

Q Email , John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

1 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Produ...	Recipient Dose...	Date of Admini...	Email	Inactive Reason
Fred		NewRecipient	Dec 12, 1944	Male		Registered		frednewrecipient@...	

Audience


- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

If the recipient informs you that their health information is **NOT CORRECT**, ask the recipient to **UPDATE** their information (e.g., responses to COVID-19 Vaccine Registration form) in the **COVID-19 VACCINE PORTAL** or edit the registration information in the CVMS Provider Portal.

Finalize Walk-In Appointment Booking

Now that the recipient has been registered successfully, you can return to the **HOME** page and follow the Standard **APPOINTMENT WALK-IN** Booking process.



[Home](#) [Recipient](#) [Appointments](#) [Slot Management](#) [Help & Information](#)

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1
Mar 09, 21, 01:17 PM	Test6 NC EHR Dose 1 Scheduled	03045771	Clinic Location1
Mar 09, 21, 01:25 PM	Test7 NC EHR Dose 2 Scheduled	03045775	Clinic Location1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

YYYY-MM-DD

Email

Search

Search Results

Appointment Booking

Name	DOB	Email	Vaccine Group:	Vaccine Dose Status
<input type="radio"/> Space t Test	1997-03-17	rohiniuat@mailinator.com	Group 4	Dose 1 Scheduled

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Exception 2: Recipient Record is Created in CVMS, but Recipient did not Complete Registration

Step 1 of 7: Navigate to the CVMS Provider Portal Home Page

The process to register an existing recipient begins on the **HOME PAGE**. You will verify that the recipient's name does not appear in the **APPOINTMENT WALK-IN TOOL**. Similar to the previous scenario, this means that the recipient is either not registered or does not have a record.

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Jill NotRegistered

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

No search results found or User's Eligibility is not Approved.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1

Please be sure to bookmark this site: <https://uat3-ncdhhs.cs32.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

If the recipient does appear in the **APPOINTMENT WALK--IN TOOL**, refer to the **RECIPIENT APPOINTMENT BOOKING** section of this User Guide.

Step 2 of 7: Search for the recipient

To check for the recipient’s record, search for them in the **RECIPIENT** tab.

- 1. Navigate to the **RECIPIENT** tab
- 2. Enter the recipient’s **NAME** (first name and last name) in the search bar
- 3. To help narrow results, enter the recipient’s **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field

Note: The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself

- 4. Click **SEARCH**

Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Q Jill W NotRegistered

Q Email , John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

1 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Produ...	Recipient Dose...	Date of Admini...	Email	Inactive Reason
Jill	W	NotRegistered	Dec 11, 1945						

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

You will not be able to log a recipient vaccine administration if the recipient is not registered in CVMS.

Registration is complete when a recipient’s answers to the COVID-19 Vaccine Registration form are entered into CVMS.

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

27

Step 3 of 7: Verify the Recipient's Registration

After clicking search, the **RECIPIENT SEARCH RESULTS** will populate in the **RECIPIENTS WITHIN CVMS** section. You will be able to verify that the recipient has a record but is not yet registered.

- 1. Click on the recipient's **NAME** to open the recipient's record
- 2. Verify that the recipient is not yet registered by confirming their **RECIPIENT DOSE STATUS** is blank
- 3. If the recipient is not yet registered, select the **REGISTER** button

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

More

Person Account

Jill W NotRegistered

Register

Schedule First Dose Appointment

Schedule Second Dose Appointment

Birthdate

Gender

Mobile

Email

Recipient Dose Status

12/11/1945

DETAILS

RELATED

Account Name

Jill W NotRegistered

Birthdate

12/11/1945

Gender

Ethnicity

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

For more information on how to handle recipient search results that appear in the **RECIPIENTS FROM LONG TERM CARE/FEDERAL PHARMACY PROGRAMS** section, please see the **WHAT IF A RECIPIENT RECEIVED THEIR FIRST DOSE THROUGH A LONG-TERM CARE FACILITY/FEDERAL PHARMACY** portion of this User Guide.

Step 4 of 7: Collect the Recipient's Demographic Information

Just as when registering a new recipient, a new browser tab will open for you to fill out the recipient's **COVID-19 Vaccine Registration form**.

- 1. Instruct the recipient to fill out a paper copy of the COVID-19 Vaccine Registration form (the PDF file is available under the **HELP & INFORMATION TAB** or on the NC Immunization Branch website at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#) labeled as **RECIPIENT REGISTRATION AND COVID-19 VACCINE ADMINISTRATION FORM** (in English and Spanish)
- 2. Click **NEXT**

Vaccine Registration for: Jill W NotRegistered

Introduction

Contact and Demographic Detail

Confirmation

COVID-19 Vaccination Registration

Please complete the registration form for COVID-19 vaccination, which should take less than 5 minutes to complete.

Information about your COVID-19 vaccination is carefully managed to protect your privacy. Your immunization information will not be shared except in accordance with state and federal law. NC CVMS is a system that enables the collection of immunization information for health and safety reasons. The immunization information collected for NC CVMS is similar to the information that is required when you go to the doctor's office or a pharmacy for a vaccination, including your name, address, date of birth, location where vaccine was given, when the vaccine was given, person who administered the vaccine, information about the specific vaccine vial (expiration date, vaccine identifier number, etc.) and how the vaccine was given (e.g., in the muscle of the right arm). NC CVMS also collects information about race and ethnicity, which is necessary to support efforts for equitable vaccine distribution in NC. To meet federal requirements established by the U.S. Centers for Disease Control and Prevention (CDC) and in accordance with NC state law, NC does not submit any identifiable information to CDC. Instead of the CDC requested identifying information, NC is currently submitting the vaccine recipient's year of birth (not date of birth), the first 3 digits of the vaccine recipient's zip code of residence (if the underlying population in that zip code includes more than 20,000 people) and the date of submission of the vaccination record. More information about federal CDC data requirements is available at:
<https://www.cdc.gov/vaccines/covid-19/reporting/requirements/index.html>

Next

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

Print several copies of the **COVID-19 Vaccine Registration form** to keep on hand for other recipients.

Step 5 of 7: Enter the Recipient's Demographic Information

- 1. Enter the recipient's demographic information entered by the recipient on **COVID-19 Vaccine Registration form**
- 2. Click **NEXT**

Vaccine Registration for: Jill W NotRegistered

Introduction

Contact and Demographic Detail

Confirmation

Please provide the information below. Items with a * are required.

* First Name

Jill

Middle Name

W

* Last Name

NotRegistered

* Address Line 1

Address Line 2

* City

* County

--None--

* State

--None--

* Zip Code

Email (Will allow you to access your vaccine information in the COVID-19 Vaccine Portal.)

Home Phone

Mobile Phone

* The best way to contact you

--None--

* Date of Birth (MM/DD/YYYY)

Dec 11, 1945

* Race

--None--

* Ethnicity

--None--

* Gender

--None--

Preferred Language

--None--

* Providing a Language preference will not provide translated text/communication, except Spanish.

Please check all disabilities that apply to you:

☒ Not Disabled

☐ Cancer

☐ Cognitive (Psychological or Psychiatric)

☐ Neurological

☐ Physical (Mobility)

☐ Respiratory

☐ Sensory (Vision or Hearing)

☐ Other (Please Specify)

Next

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

We strongly encourage recipients to provide a valid email address as it will give them access to the COVID-19 Vaccine Portal, from where they can download their Vaccine Information PDF.

If a recipient lives in an apartment or suite, use the optional **ADDRESS LINE 2** field.

Step 6 of 7: Submit the Recipient's Information

Review the information you entered from the paper copy of the recipient's **COVID-19 Vaccine Registration form**.

- 1. Review that the information entered matches the information given by the recipient
- 2. To make changes, select **PREVIOUS**
- 3. If the information is correct, select **SUBMIT**

Home Recipient Appointments Help & Information

Vaccine Registration for: Jill W NotRegistered

Introduction

Contact and Demographic Detail

Confirmation

Confirm and submit to enroll

Please review the information below and confirm that it is correct. Click submit to complete your registration.

Background Information

First Name Jill

Middle Name W

Last Name NotRegistered

Address 123 Main Street

City Raleigh

County Wake

State North Carolina

Zip Code 12345

Country United States

Email

Home Phone

Mobile Phone

The best way to contact you None

Date of Birth (MM/DD/YYYY) 12/11/1945

Race Black or African American

Ethnicity Not Hispanic or Latino

Gender Female

Preferred Language English

Disability Not Disabled

Previous

Submit

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

If you have any questions about what a recipient wrote, ask them for clarification before submitting.

Step 7 of 7: Verify the Recipient's Registration

- 1. The **REGISTRATION IS COMPLETE**
- 2. The recipient's **RECIPIENT DOSE STATUS** is updated to **REGISTERED** and is visible on the Recipient tab

Vaccine Registration for: Jill W NotRegistered

Introduction

Contact and Demographic Detail

Confirmation

Your registration is complete

Thank you for completing the registration process. Please remember that registration does not mean that you are currently eligible to be vaccinated or that you have an appointment. A free COVID-19 vaccine will be available to all who want it, but supplies are currently limited. Get accurate information about COVID-19 vaccines at [YourSpotYourShot.NC.Gov](#).

Home Recipient Appointments Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Q Jill W NotRegistered

Q Email , John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

1 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Produ...	Recipient Dose...	Date of Admini...	Email	Inactive Reason
Jill	W	NotRegistered	Dec 11, 1945	Female		Registered			

Audience


- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

If the recipient informs you that their health information is **NOT CORRECT**, ask the recipient to **UPDATE** their information (e.g., responses to COVID-19 Vaccine Registration form) in the **COVID-19 VACCINE PORTAL** or edit the registration information through the CVMS Provider Portal.

Finalize Walk-In Appointment Booking

Now that the recipient has been registered successfully, you can return to the **HOME** page and follow the standard **APPOINTMENT WALK-IN** Booking process.



[Home](#) [Recipient](#) [Appointments](#) [Slot Management](#) [Help & Information](#)

You are currently logged in as Clinic Location1

[Switch Locations](#)

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

[Go](#)

No Appointment Confirmation Number?

[Search Appointments](#)

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1
Mar 09, 21, 01:17 PM	Test6 NC EHR Dose 1 Scheduled	03045771	Clinic Location1
Mar 09, 21, 01:25 PM	Test7 NC EHR Dose 2 Scheduled	03045775	Clinic Location1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Space Test

YYYY-MM-DD

Search Email

[Search](#)

Search Results

[Appointment Booking](#)

Name	DOB	Email	Vaccine Group:	Vaccine Dose Status
<input type="radio"/> Space t Test	1997-03-17	rohiniuat@mailinator.com	Group 4	Dose 1 Scheduled


Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile



NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

33

Other Operations on Recipient Records at Point of Care:


- 1. Editing Recipient Registration Record Details*
- 2. Looking Up A Recipient Who Received Their First Dose Through a Long-Term Care Facility Partnering Pharmacy*
- 3. Cancelling an Existing Appointment*
- 4. Marking a Recipient as Deceased*

Note: if your location enabled CVMS Scheduling, please check the addendum document here:
[*https://covid19.ncdhhs.gov/media/2379/download*](https://covid19.ncdhhs.gov/media/2379/download)

Editing Recipient Registration Record Details

Step 1 of 4: Navigate to the CVMS Provider Portal Recipient Tab

In some instances, a recipient may need to edit the information on their COVID-19 Vaccine Registration form. To do so, navigate to the Recipient Tab.



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

You are currently logged in as Clinic ABC Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Feb 09, 21, 09:30 AM	John3 Deere3 Dose 1 Scheduled	00112756	Clinic ABC Loc 1
Feb 09, 21, 04:39 PM	reji11 ayod11 Dose 1 Scheduled	00112837	Clinic ABC Loc 1
Feb 09, 21, 04:47 PM	reji12 ayod12 Dose 2 Scheduled	00112842	Clinic ABC Loc 1

Appointment Walk-In


You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Step 2 of 4: Search for the Recipient

- 1. Enter the recipient's **NAME** (first name and last name) in the search bar for the recipient who needs their COVID-19 Vaccine Registration form updated
 - 2. To help narrow results, enter the recipient's **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field
- Note:** The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself
- 3. Click **SEARCH**
 - 4. Click on the desired recipient from your search results



[Home](#) [Recipient](#) [Appointments](#) [Help & Information](#)

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Search

Recipients within CVMS

1 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Produ...	Recipient Dose...	Date of Admini...	Email	Inactive Reason
Edit	R	Questionnaire	Jan 1, 1994	Male		Registered		editq@mailinator.c...	

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

Only select a recipient record that populates in the **RECIPIENTS WITHIN CVMS** section of your search results

Step 3 of 4: Edit the Recipient

- 1. From the Recipient record, click the pencil icon next to the field you need to edit
- 2. Make any necessary changes (fields where you've made a change will be highlighted in **YELLOW**)
- 3. Click **SAVE**

Home

Recipient

Appointments

Slot Management

Help & Information

Person Account

Edit R Questionnaire

Recipient Dose Status
Registered

DETAILS

RELATED

Account Name

Edit R Questionnaire

Gender

Male

Race

White

Employer

Vaccination Status

Registered

MPI

Birthdate

1/1/1994

Ethnicity

Not Hispanic or Latino

Recipient Dose Status

Registered

Mark Inactive?

☐

Inactive Reason

Home

Recipient

Appointments

Slot Management

Help & Information

Person Account

Edit R Questionnaire

Recipient Dose Status
Registered

DETAILS

RELATED

* Account Name

Salutation

--None--

First Name

Edit

Middle Name

R

* Last Name

Questionnaire

Suffix

* Gender

Male

* Race

White

Employer

Search Accounts...

Vaccination Status

Registered

MPI

* Birthdate

1/1/1994

* Ethnicity

Not Hispanic or Latino

Recipient Dose Status

Registered

Mark Inactive?

☐

Inactive Reason

--None--

Cancel

Save

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

If you make an update that you did not mean to make, you can select the **UNDO** arrow to revert to the original value or click **CANCEL**.

Step 4 of 4: Confirm Updates

Home

Recipient

Appointments

Slot Management

Help & Information

Person Account

Edit R Questionnaire

Recipient Dose Status

Registered

DETAILS

RELATED

Account Name

Edit R Questionnaire

Gender

Male

Race

White

Employer

Vaccination Status

Registered

MPI

Birthdate

1/1/1949

Ethnicity

Not Hispanic or Latino

Recipient Dose Status

Registered

Mark Inactive?

☐

Inactive Reason

The updated information will now show as part of the recipient’s record.

Review the information that you entered to ensure it is correct.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

Any changes you make to a recipient’s record will be reflected when the recipient logs in to the COVID-19 Vaccine Portal.

Looking Up A Recipient Who Received Their First Dose Through a Long-Term Care Facility or Federal Partnering Pharmacy

Step 1 of 5: Navigate to the Recipient Tab

The federal government has an agreement with pharmacy partners (e.g., CVS, Walgreens) to vaccinate Long Term Care Facility and Nursing Homes residents and staff. These pharmacy partners and other Federal Pharmacy Programs do not use CVMS, but instead upload their vaccination records directly to the CDC.

Even if a recipient received their first dose through a pharmacy partner, they could receive their second dose from a healthcare provider enrolled in CVMS. To vaccinate them, you will have to locate and verify the first dose record before administering a second dose within CVMS.


Begin by navigating to the **RECIPIENT** tab from the CVMS Provider Portal Home Page.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile



Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Full name, ex: John Smith

Email, John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

0 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient D...	Date of Adm...	Email	Inactive Rea...
------------	-------------	-----------	---------------	--------	----------------	----------------	----------------	-------	-----------------

Recipients from Long Term Care/Federal Pharmacy Programs

First Name	Last Name	Date of Birth	Gender	Dose Number	Vaccine Manufacture...	Vaccination Administrati...
------------	-----------	---------------	--------	-------------	------------------------	-----------------------------

No results, please search again.


Step 2 of 5: Search for the Recipient

To check for the recipient’s record, search for them in the **RECIPIENT** tab.

- 1. Enter the recipient’s **NAME** (first name and last name) in the search bar
- 2. To help narrow results, enter the recipient’s **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field

Note: The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself

- 3. Click **SEARCH**



Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Full name, ex: John Smith

Email, John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

0 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient D...	Date of Adm...	Email	Inactive Rea...
------------	-------------	-----------	---------------	--------	----------------	----------------	----------------	-------	-----------------

Recipients from Long Term Care/Federal Pharmacy Programs

First Name	Last Name	Date of Birth	Gender	Dose Number	Vaccine Manufacture...	Vaccination Administrati...
------------	-----------	---------------	--------	-------------	------------------------	-----------------------------

No results, please search again.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

It’s possible that the recipient has a result in both the **RECIPIENTS WITHIN CVMS** and the **RECIPIENTS FROM LONG TERM CARE/FEDERAL PHARMACY PROGRAMS** section. The first record in the CVMS section means they were uploaded by an eligible organization.

The record in the second section means they received their first dose through a Pharmacy Partner.

Step 3 of 5: Search for the Recipient


- 1. Locate the **CORRECT** recipient in the **RECIPIENTS FROM LONG TERM CARE/FEDERAL PHARMACY PROGRAMS** section of the search results
- 2. The recipient may also appear as a search result in the **RECIPIENTS WITHIN CVMS** section. In that instance, note the **RECIPIENT DOSE STATUS** to see if CVMS has a record of the recipient’s first dose
- 3. Click on the recipient’s name in the **RECIPIENTS FROM LONG TERM CARE/FEDERAL PHARMACY PROGRAMS** section

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile



Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

TestDemo

Email , John@j.com

Date of Birth (optional), MM/DD/YYYY

Search


Recipients within CVMS

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient Do...	Date of Adm...	Email	Inactive Rea...
Nicholas		TestDemo	Feb 24, 1989						

Recipients from Long Term Care/Federal Pharmacy Programs

First Name	Last Name	Date of Birth	Gender	Dose Number	Vaccine Manufacture...	Vaccination Administratio...
Nicholas	TestDemo	Feb 24, 1989				

1



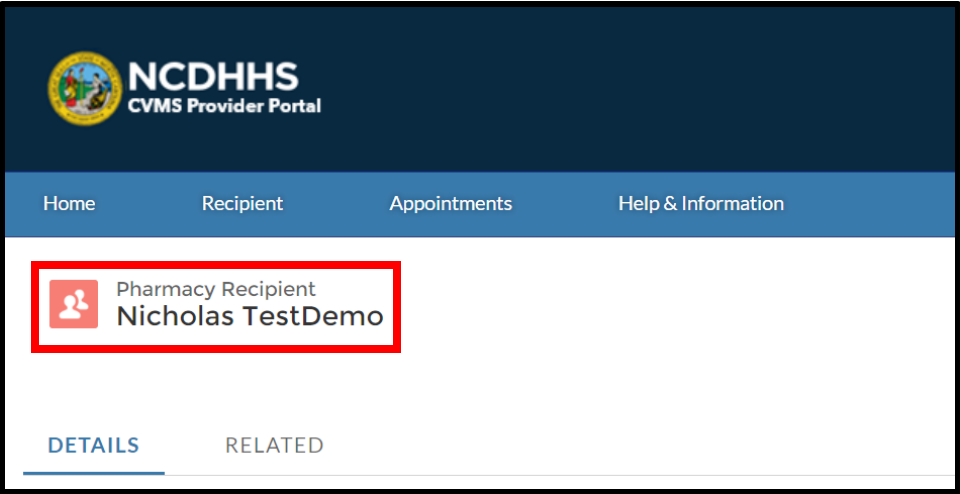
NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

43

Step 4 of 5: View the Recipient's Pharmacy Record

Clicking the recipient's name in the **RECIPIENTS FROM LONG TERM CARE/FEDERAL PHARMACY PROGRAMS** section will open the recipient's **PHARMACY RECIPIENT** record. This record has no connection to a CVMS Recipient Record and is used only as reference data.

- 1. Scroll down in the **PHARMACY RECIPIENT** record to determine when the recipient received their first dose
- 2. If the recipient is eligible for their second dose, use the information in the **PHARMACY RECIPIENT** record to inform which COVID-19 vaccine product the recipient should receive



Administration Details	
Vaccination Event ID	1.11000012362203E+16
VTckS provider PIN	079900
Administered at Location:type	CVX
Medical practice : family medicine	207
Administered at Location:name	NDC
79900	80777-0273-99
Administration address: street	Vaccine Lot Number
UNK	4LH35
Administration address: street 2	Vaccine Expiration Date
11 W Jones St	12/6/2021
Administration address: city	Vaccine Site of Administration
Raleigh	Right Thigh
Administration address: county	Vaccine Route of Administration
Wayne	Subcutaneous (SQ)
Administration address: zip code	Vaccination refusal
27601	
Administration address: state	
North Carolina	
Vaccination Administration Date	
1/12/2021	

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

The **PHARMACY RECIPIENT** record will indicate which pharmacy administered the vaccine, as well as the Vaccine Manufacturer Name, date of vaccination, and other relevant information.

Step 5 of 5: Other Considerations


- 1. If the recipient has no record in CVMS, refer to the **EXCEPTION 1** portion of this User Guide to create their CVMS recipient record and register them on-site. Then follow the standard **APPOINTMENT WALK-IN** Booking process
- 2. If the recipient has a record in CVMS, but is not registered, refer to the **EXCEPTION 2** portion of this User Guide to conduct on-site registration. Then follow the standard **APPOINTMENT WALK-IN** Booking process

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

Keep a tab open with the **PHARMACY RECIPIENT** record when administering the second dose of the COVID-19 vaccine, since it will not appear in the **FIRST DOSE DETAILS** section of the Vaccine Administration details.



Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

TestDemo

Email , John@j.com

Date of Birth (optional), MM/DD/YYYY

Search


Recipients within CVMS

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient Do...	Date of Adm...	Email	Inactive Rea...
Nicholas		TestDemo	Feb 24, 1989						

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number	Vaccine Manufacture...	Vaccination Administratio...
Nicholas	TestDemo	Feb 24, 1989				

1



NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

45


Cancelling an Existing Appointment

Step 1 of 5: Search for the recipient

The process to cancel an existing appointment for a recipient begins on the **APPOINTMENTS** tab.

NOTE: There are a few scenarios that may result in an automatic cancellation. First, if a recipient is manually added to **TODAY'S APPOINTMENTS** but does not complete their appointment within 72 hours, the appointment will be **AUTOMATICALLY** cancelled, and their Dose Status will update to **DOSE 1 (or 2) CANCELLED**). The second scenario occurs if a recipient creates multiple scheduled appointments (for example at different locations in hopes of being vaccinated as quickly as possible). If a recipient has multiple appointments, all the remaining appointments will be automatically cancelled as soon as one of the appointments is changed to a **DOSE 1 (or 2) ADMINISTERED** status.

- 1. Navigate to the **APPOINTMENTS** tab



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1

Please be sure to bookmark this site: <https://uat3-nccnns.cs3.zforce.com/vaccine-provider>

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

Providers using CVMS Direct (EHR integration) may also notice cancelled appointments appearing in the system. Those appointments are created during the integration process and will be automatically cancelled and marked as **DUPLICATE** as they are a replica of the scheduled appointment.

Step 2 of 5: Search for the recipient

- 1. You can use the **SEARCH APPOINTMENTS** field to search for the recipient by **NAME**
- 2. Set the **FROM** and **TO** fields to include the date of the appointment that needs to be cancelled (the field will default to the current date)
- 3. Click **SEARCH**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

[Home](#) [Recipient](#) [Appointments](#) [Help & Information](#)

You are currently logged in as Clinic Org1

Appointments

All Appointments

3 items

Search Appointments

Search Case/Confirmation Number

From

2021-04-01

To

Status

--- None ---

Search

Reset

3 records found.

<input type="checkbox"/>	Case	Confirmati...	Date	Time	Recipient ...	DOB	Location	Cancellatio...	Vaccine ...	Status
<input type="checkbox"/>	03499186		Apr 12, 2021	1:11:27 PM	Walkin Example	1965-12-12			Dose 1 Schedul...	New
<input type="checkbox"/>	03499652		Apr 12, 2021	6:07:01 PM	Steve Rodger	2000-01-01			Dose 1 Schedul...	New
<input type="checkbox"/>	03499746	d75449mzu5.1	Apr 12, 2021	7:00:00 PM	Peter Parker	2000-03-03			Dose 1 Schedul...	New

← Previous

Page 1 out of 1

Next →

Step 3 of 5: Confirm the Appointment to Cancel

After clicking search, the existing **APPOINTMENTS** will populate underneath the Appointments List View.


- 1. Locate the correct **RECIPIENT** who needs an appointment cancelled
- 2. Verify the recipient's identity
- 3. Select the checkbox to the left of the recipient's name
- 4. Select the **CANCEL APPOINTMENT** button

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Org1

Appointments

All Appointments

3 items

Cancel Appointment

Search Appointments

Search Case/Confirmation Number

From

To

Status

Search by Name, Location, Vaccine Status

2021-04-01

--- None ---

Search

Reset

3 records found.

<input type="checkbox"/>	Case	Confirmati...	Date	Time	Recipient ...	DOB	Location	Cancellatio...	Vaccine ...	Status	
<input checked="" type="checkbox"/>	03499186		Apr 12, 2021	1:11:27 PM	Walkin Example	1965-12-12			Dose 1 Schedul...	New	
<input type="checkbox"/>	03499652		Apr 12, 2021	6:07:01 PM	Steve Rodger	2000-01-01			Dose 1 Schedul...	New	
<input type="checkbox"/>	03499746	d75449mzu5.1	Apr 12, 2021	7:00:00 PM	Peter Parker	2000-03-03			Dose 1 Schedul...	New	

← Previous

Page 1 out of 1

Next →

Step 4 of 5: Cancel the Appointment

Selecting the **CANCEL APPOINTMENT** button will initiate a pop-up window to appear on the screen.

- 1. Input a **CANCELLATION REASON** from the drop-down menu (you may optionally add a cancellation description in the free text field)
- 2. Select the **CANCEL APPOINTMENT** button

Home

Recipient

Appointments

Help & Information

You are currently logged in as

Appointments

All Appointments

3 items

Cancel Appointments

DATE	TIME	RECIPIENT NAME	DOB	PROVIDER LOCATION	CANCELLATION REASON	CANCELLATION DESCRIPTION
Apr 12, 2021	01:11 PM	Walkin Example	1965-12-12	Clinic Org1	<div>choose one...</div> <div><div>choose one...</div><div>Recipient did not show up</div><div>Recipient Pre Appointment Cancellation</div><div>Insufficient Inventory</div><div>Recipient Refusal</div><div>Duplicate</div></div>	

Cancel Appointment

Status

--- None ---

Search

Reset

Status

Case

Cor

<input checked="" type="checkbox"/>	03499186	Apr 12, 2021	1:11:27 PM	Walkin Example	1965-12-12	1 Schedul...	New	
<input type="checkbox"/>	03499652	Apr 12, 2021	6:07:01 PM	Steve Rodger	2000-01-01	Dose 1 Schedul...	New	
<input type="checkbox"/>	03499746	d75449mzu5.1	Apr 12, 2021	7:00:00 PM	Peter Parker	2000-03-03	Dose 1 Schedul...	New

← Previous

Page 1 out of 1

Next →

Audience


- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

50

Step 5 of 5: Confirm the Appointment is Cancelled

The recipient should no longer have their appointment booked. If the recipient’s appointment was for today, the recipient should no longer appear on the **TODAY’S APPOINTMENTS** tool.



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

View Appointment / Cancellation History

To view a record of a recipient’s appointment history, navigate to the Recipient tab, locate the recipient’s record, and select **RELATED** tab. The recipient’s appointment records will appear. Selecting an appointment record will bring up the details of that appointment, including a **CANCELLATION REASON** if applicable.

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Person Account

Mr. Test Data

Register

Search

Birthdate

Gender
Male

Mobile

Email

Recipient Dose Status
Dose 1 Canceled

DETAILS

RELATED

Appointments (2)

Appointment	Date and Time of Vaccin...	Vaccine Status	Vaccine
08705594		Dose 1 Canceled	
08705593		Registered	

View All

*NOTE: If an appointment was cancelled automatically, the **CANCELLED BY SYSTEM VIA BATCH JOB** field will be checked.*

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Shipments

More

DETAILS

RELATED

Change Recipient

Case Number
08705594

Vaccine Status
Dose 1 Canceled

Account Name
[Clinic location1](#)

Vaccine

Name
[Test Data](#)

Vaccine Inventory

Appointment DateTime
4/21/2021, 4:18 AM

Lot #

Date and Time of Vaccination

Vaccine Dosage

Adverse Reaction Consent

Injection Site

Schedule Dose2 Followup Email

Route

Cancellation Reason
Duplicate

Administered By

Cancellation Description

On Behalf of (Clinician)

Cancelled by System via Batch Job
☒

Audience

Healthcare
Provider

Healthcare
Location Manager


Statewide
Location Manager
Profile

Marking a Recipient as Deceased

Step 1 of 5: Navigate to the Recipients Tab

Providers can mark a recipient as deceased within CVMS to ensure that no further system-generated communications are sent to the deceased recipient’s email address.

- 1. Navigate to the **RECIPIENT** tab



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Please be sure to bookmark this site: <https://uat3-ncdhhs.cs3.zforce.com/vaccineprovider>

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Step 2 of 5: Search for the Recipient


- 1. Enter the deceased recipient's **NAME** (first name and last name) in the search bar
 - 2. To help narrow results, enter the recipient's **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field
- Note:** The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself*
- 3. Click **SEARCH**
 - 4. Click the name of the **DECEASED RECIPIENT**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Full name, ex: John Smith

Email, John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

0 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient D...	Date of Adm...	Email	Inactive Rea...
------------	-------------	-----------	---------------	--------	----------------	----------------	----------------	-------	-----------------

Recipients from Long Term Care/Federal Pharmacy Programs

First Name	Last Name	Date of Birth	Gender	Dose Number	Vaccine Manufacture...	Vaccination Administrati...
------------	-----------	---------------	--------	-------------	------------------------	-----------------------------


No results, please search again.



NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

Step 3 of 5: Edit recipient Record

- 1. Click the pencil icon next to the **MARK INACTIVE** field




Home

Recipient

Appointments

Help & Information

 Person Account

Deceased Recipient

Register

Schedule First Dose Appointment

Vaccine Group

Group 2

Recipient Dose Status

Dose 1 Scheduled

DETAILS

RELATED

Account Name

Deceased Recipient

Gender

Male

Race

White

Employer

Vaccine Group

Group 2

Vaccination Status

Registered

Disabilities

Not Disabled

Other Disability

Birthdate

1/1/1922

Ethnicity

Not Hispanic or Latino

Recipient Dose Status

Dose 1 Scheduled

Mark Inactive?

☐

Inactive Reason

Preferred Language

English

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Step 4 of 5: Mark Recipient as Deceased

- 1. Check the box under the **MARK INACTIVE** field
- 2. From the drop-down menu for **INACTIVE REASON**, select **DECEASED**

*Account Name

Salutation

--None--

First Name

Deceased

Middle Name

*Last Name

Recipient

Suffix

*Gender

Male

*Race

White

Employer

Search Accounts...

Vaccine Group

Group 2

Vaccination Status

Registered

*Birthdate

1/1/1922

*Ethnicity

Not Hispanic or Latino

Recipient Dose Status

Dose 1 Scheduled

Mark Inactive?

☒

Inactive Reason

Deceased

Mark Inactive?

☒

Inactive Reason

Deceased

--None--

☒ Deceased

Bad Data

Duplicate

Inactive Reason

Bad Data

You do not have permission to specify this Inactive reason.
Please confirm the selection.

Note: If you select **BAD DATA** or **DUPLICATE** you will receive an error message.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

If a recipient record needs to be marked inactive because it is either bad data or a duplicate of another record, please submit a request through the **CVMS HELP DESK PORTAL** at https://ncgov.servicenow.com/csm_vaccine.

Step 5 of 5: Confirm Update

- 1. After updating the recipient's record to **DECEASED**, a pop-up message appears asking you to confirm that the information has been validated
- 2. On the Recipient tab, the deceased recipient will now show **DECEASED** in the **INACTIVE REASON** column

You have marked this record as Deceased. Please check this information has been validated.

OK

Home Recipient Appointments Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Deceased

Email , John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

1 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Pro...	Recipient Do...	Date of Adm...	Email	Inactive Rea...
Deceased		Recipient	Jan 1, 1922	Male		Dose 1 Scheduled			Deceased

Audience

Healthcare Provider





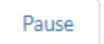
Healthcare Location Manager

Statewide Location Manager Profile

Appendix

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

User Guide Change Log

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/1/2020	<ul style="list-style-type: none"> Initial document 		Azalea Troche
2	12/18/2020	<ul style="list-style-type: none"> Added Create Recipient, Register Recipient sections, updated Process Flow, added Generic Employer List, eligibility criteria 	7, 13-14, 15-37, 40	Steve DiGangi
3	1/15/2021	<ul style="list-style-type: none"> Updated instructions for Creating Recipient Updated Screenshots Updated instructions for Appointment Booking (select a location) Updated Understanding How Recipient Eligibility Status is Determined Section Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information Added "What to do if a Recipient received their first dose through a LTC/Pharmacy" section Added Cancelling an Existing Appointment Section 	1, 2, 13, 19, 23, 32, 35-40, 41-47	Steve DiGangi Courtney Seward
4	1/26/2021	<ul style="list-style-type: none"> Added in Updated Priority Group Tiering Logic Corrected Priority Tiering Screenshots Added screenshots to include Location Switcher button 	5, 9, 11-14, 24-25, 33-34, 37-38, 50	Steve DiGangi
5	2/9/2021	<ul style="list-style-type: none"> Added new section on Editing Recipient Registration Information Updated section titles in TOC 	35-39 3, 4, 8, 15, 26, 40, 46	Steve DiGangi
6	3/4/2021	<ul style="list-style-type: none"> Updated eligibility branding to Vaccine Group Updated COVID-19 Vaccine Portal branding to COVID-19 Vaccine Portal Removed priority tiering logic and eligibility visibility 	3, 5-7, 9-14, 17-24, 30-33, 37, 39, 41-43, 45, 53, 54, 56	Steve DiGangi
7	3/10/2021	<ul style="list-style-type: none"> Updated Overview slide Updated branding to include Recipient Check-In tool Updated Cancelling an Existing Appointment section 	5, 9, 14, 25, 34, 36, 47, 51, 56	Steve DiGangi
8	4/16/2021	<ul style="list-style-type: none"> Removed Eligibility definition Updated branding to remove Vaccine Group and add date/product of vaccination Added search by email address in Recipient tab Added Cancellation changes for 24-hour automatic cancel after a no-show, automatic cancellation if there are duplicate appointments, and cancel reason picklist Added new section on marking recipient deceased Removed slide concerning inactive Vaccine Groups 	5, 8-12, 15, 16, 18-22, 26-31, 35-37, 39-41, 43, 45-48, 51-56	Steve DiGangi
9	5/05/2021	<ul style="list-style-type: none"> Updated branding to change "Long term care/federal pharmacy programs" fields 	16, 17, 18, 41, 42, 43, 45, 55	Kaitlin Gates
10	5/16/2021	<ul style="list-style-type: none"> Updated Cancel Appointment section to show if an appointment was cancelled automatically 	52	Steve DiGangi
11	6/13/2021	<ul style="list-style-type: none"> Updated screenshot of registration form Updated auto-cancellation rule to reflect 72-hour cancellation after no-show appointments 	30, 47	Steve DiGangi
12	6/30/2021	<ul style="list-style-type: none"> Added Address Line 2 field Updated branding of screenshots 	21, 28, 30	Steve DiGangi